

We claim:

1. A method of optimizing a product, said product including a base product, the method comprising the steps of:

5 (a) obtaining an identification of a user and a preliminary designation of said product; said identification identifying a user profile associated with said user that includes at least one characteristic corresponding to said user; wherein said user profile is created when it does not exist;

(b) providing a formatted display that includes content related to said product, the  
10 format of said formatted display determined by a characteristic in said user profile;

(c) updating, based on a response to said formatted display:

(1) a characteristic in said user profile; and

(2) a component associated with said base product when said response  
includes a selection of an option from a different set of options associated  
15 with said component; and

(d) repeating steps (b) and (c) at least once to optimize said product.

2. The method of Claim 1, wherein said product further includes a plurality of components associated with said base product, each component in said plurality of  
20 components corresponding to, and selected by said user from, a different set of options, using said formatted display.

3. The method of Claim 2, wherein a default option is designated for each component in said plurality of components.  
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4. The method of Claim 2, wherein said formatted display comprises a menu including one or more elements selected from the group consisting of an option selected from said different set of options associated with said component, a frequently asked question associated with said component, an instructional sequence prompt, and a recommendation  
30 message.

5. The method of Claim 4, wherein said characteristic in said user profile that is updated in step (c) of Claim 1, based on said response to said formatted display, determines an element that is included in said menu in a subsequently executed instance of step (b) of  
35 Claim 1.

6. The method of Claim 1, wherein the formatted display provides a portion of a set of options corresponding to a component associated with said base product.
7. The method of Claim 1, wherein said response to said formatted display of step (b) includes a designation of an option for a component associated with said base product and step (c) further comprises the step of updating said component in said user profile.
8. The method of Claim 1, wherein said product is optimized when said user indicates that said product is optimized.
9. The method of Claim 1, wherein said formatted display reports a correlation between a component in said product and a characteristic in said user profile when said correlation exceeds a threshold value.
10. The method of Claim 9, wherein said correlation between said component in said product and said characteristic in said user profile is reduced when there is a conflict between a first and a second component in a plurality of components associated with said base product.
11. The method of Claim 9, further comprising the steps of:  
determining a change to a component in the plurality of components associated with said base product that maximizes said correlation between said component in said product and said characteristic in said user profile;  
presenting said change in response to a user generated event; and  
implementing said change to said product when a confirming response is received.
12. The method of Claim 9, wherein said product further includes a plurality of components associated with said base product, each component in said plurality of components associated with, and selected from, a different set of options; and  
said correlation between a component associated with said product and a characteristic in said user profile exceeds a threshold value when said response to said formatted display of step (c) includes a designation of an option for a component associated with said base product.
13. The method of Claim 1, wherein, when said user does not respond to said formatted

display within a period of time, said response comprises a signal that said user has chosen not to respond to said formatted display.

14. The method of Claim 1, wherein options for said component are presented in said  
5 formatted display of step (b); wherein the selected component is dynamically selected from a plurality of components associated with said base product based on a function of a characteristic in said user profile.

15. The method of Claim 1, further comprising the steps of:  
10 transmitting a set of questions;  
receiving at least one answer to said set of questions; and  
updating said characteristic in said user profile based on said at least one answer.

16. The method of Claim 1, wherein a characteristic in said user profile associated with  
15 said user is modified based on a user event associated with said user occurring during an optimization of a different product.

17. The method of Claim 1, wherein a characteristic in said user profile associated with  
20 said user is modified based on a user event associated with said user occurring during an optimization of said product during a different session.

18. A computer readable memory to direct a computer to optimize a product, said  
product including a base product, comprising:  
a user profile database stored in said memory; each profile in said user profile  
25 database associated with a different user and including a characteristic that corresponds to said user; and

an advisor module for helping a user optimize said product;  
said advisor module including executable instructions, said executable instructions  
including:

30 (a) instructions for obtaining an identification of said user and a preliminary designation of said product; said identification identifying a user profile associated with said user that includes at least one characteristic corresponding to said user in said user profile database; wherein said instructions for obtaining an identification further include instructions for creating said user profile when it does not exist in  
35 said user profile database;

(b) instructions for providing a formatted display that includes content related to said product, the format of said formatted display determined by a function of a characteristic in said user profile;

(c) instructions for updating, based on a response to said formatted display:

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(1) a characteristic in said user profile; and

(2) a component associated with said base product when said response includes a selection of an option from a different set of options associated with said component; and

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(d) instructions for repeating steps (b) and (c) at least once to optimize said product.

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19. The computer readable memory of Claim 18, wherein said product further includes a plurality of components associated with said base product, each component in said plurality of components corresponding to, and selected by said user from, a different set of options.

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20. The computer readable memory of Claim 19, wherein a default option is designated for each component in said plurality of components.

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21. The computer readable memory of Claim 18, wherein the formatted display provides a portion of a set of options corresponding to a component associated with said base product.

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22. The computer readable memory of Claim 18, wherein said response to said formatted display of step (b) includes a designation of an option for a component associated with said base product and step (c) further includes instructions for updating said component in said user profile.

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23. The computer readable memory of Claim 18, wherein said product is optimized when said user indicates that said product is optimized.

24. The computer readable memory of Claim 18, wherein said formatted display reports a correlation between a component in said product and a characteristic in said user profile when said correlation exceeds a threshold value.

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25. The computer readable memory of Claim 18, wherein said user does not respond to

said formatted display within a period of time and said response received by said instructions for receiving a response comprises a signal that said user has chosen not to respond to said formatted display.

5 26. The computer readable memory of Claim 18, wherein instructions for obtaining an identification of a user and a preliminary designation of said product further includes:

instructions for querying said user profile database and identifying said user profile from a response to said query; wherein, when a response to said query fails to identify said profile, said instructions to obtain a user profile further include:

10 instructions for initiating a new user profile and associating said new user profile with said user; and

instructions for storing said new user profile in said user profile database.

15 27. The computer readable memory of Claim 18, further comprising:

a knowledge database stored in said memory; said knowledge database including a description of said base product and a description of at least one option in at least one set of options corresponding to a component associated with said base product; wherein:

20 said instructions for providing a formatted display, which includes the set of options corresponding to a component selected from said plurality of components associated with said base product, further includes:

instructions for accessing a description of an option in said different set of options associated with said component from said knowledge database; wherein said function comprises a comparison of said description with said characteristic in said user profile.

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28. The computer readable memory of Claim 18, further comprising:

a sales module; said sales module including executable instructions, said executable instructions including:

30 (a) instructions for providing a product selection choice; each said product in said product selection choice including a base product and at least one default component;

(b) instructions for receiving an election; said election designating a product in said product selection choice;

(c) instructions for determining when to call an instance of said advisor module; and

(d) instructions for calling an instance of said advisor module.

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29. The computer readable memory of Claim 28, wherein said instructions for calling an instance of said advisor module further includes instructions for generating said event record and for passing said event record to said advisor module when said instance of said advisor module is called by said sales module.

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30. The computer readable memory of Claim 28, the computer readable memory further comprising a sales module database for storing pricing information associated with said product; the sales module further including:

instructions for querying said sales database for pricing information corresponding  
10 to said product selection; and  
instructions for transmitting said pricing information.

31. The computer readable memory of Claim 28, wherein said sales module further includes:

15 instructions for providing a user selectable event;  
instructions for receiving an indication that said user selectable event tag has been selected by said user; said sales module further including instructions for notifying said advisor module when said tag is received.

20 32. The computer readable memory of Claim 28, wherein said sales module further comprises instructions for terminating an instance of said advisor module when a second election is received by said instructions for receiving an election; said second election including an indication that said user wishes to terminate said instance of said advisor module.

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33. The computer readable memory of Claim 18, wherein said profile in said user profile database includes a user identifier and at least one entry selected from the group consisting of a domain familiarity indicator, an advisor interaction database, a product preference database, a product selection database, and a user characteristic.

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34. The computer readable memory of Claim 18, wherein said formatted display comprises a menu including one or more elements selected from the group consisting of an option associated with a component, associated with said base product a frequently asked question associated with said component, an instructional sequence prompt, and a  
35 recommendation message.

35. The computer readable memory of Claim 18, wherein a manifestation of said advisor module includes at least one feature selected from the group consisting of an on-screen character, an audible voice, text, a multimedia prop, and a sound effect.

- 5 36. The computer readable memory of Claim 18, wherein said advisor module further comprises:
- instructions for storing a record of said product optimization; and
  - instructions for resuming a product optimization based on a stored record of a prior product optimization.

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